511 Rideshare Partnerships Strategy

Fall 2015

Goal

MTC wants to support the adoption and use of mobile carpool applications to increase regional carpooling and eliminate the need to have a 511 Ridematching System (RMS). The 511 Ridematch system would be phased out once private sector apps prove to be a viable alternative. A proposed framework for this decision-making process is provided at the end of this document.

Strategy

- **Phase 0 Kick-Off Activities** In October 2015, we will develop strategies and protocols for the partnerships, collect necessary documents/information from the partners.
- Phase 1 Build Awareness: Between October 2015 and December 2016, we will focus on incorporating the partners into our ongoing processes, including website updates, placement calls, e-blasts, social media, and events. We will hold trainings and demonstrations for 511 Rideshare staff.
- Phase 2 Develop Technology: During 2016, we will develop, design, and implement technological changes intended to improve services to commuters. Customers will be given more seamless opportunities to transfer to the private sector (e.g., "opt in," partner feeds in RMS, and "Carpool Well"), and we will improve usability of the trip diary. All Phase 1 activities will continue.

Note: This strategy includes activities that go beyond Parsons Brinckerhoff's contract. The intent is for the Parsons Brinckerhoff team to implement this strategy through June 30, 2016 (contract end date) and then MTC can determine if and how the strategy is continued as part of the new contract.

Approach

Phase 0 - Kick-Off Activities – In October 2015, we will conduct demonstrations of private sector at MTC, develop strategies and protocols for the partnerships, and collect necessary documents/information from the partners.

			Pre-Partnership				Мо	nth c	f Pa	Partnership								
Act	ivity/Sub-Activity	Responsible Party	Oct	Nov	Dec	1	2	3	4	5	6	7						
Pro	ject Management2																	
	Establish communications protocol with App Partners. This would include developing an agenda for a kick-off meeting, planning regular check-in meetings, identifying a point of contact. Establishing when each entity will use the other's branded materials. This will also establish a protocol for data sharing.	Barbara/ Jumana																
	Identify all marketing information and images, and other appropriate documents to collect from Partners.	Jumana																
	Develop box directory including all contacts, files, plans, etc.	Jumana																
	Finalize this strategy and share with all partners	Barbara/ Jumana/ Partners																
Dev	velop promotional strategy with each App Partner																	
	Identify each app's capabilities, operations, and data/registration needs	Jumana																
	Develop ideas for promotions and marketing/joint marketing to share with partners in advance of partner kick-off meetings. Meet with each Partner to understand their focus, priorities, etc. (geography, routes, target audience, roll-out plan, marketing strategy, etc) and to strategize with each partner about joint marketing strategies.	Jumana/ Partners																

		Pre-Partnership				Мо	nth c	of Pa			
Activity/Sub-Activity	Responsible Party	Oct	Nov	Dec	1	2	3	4	5	6	7
Develop plan for how to present each App in 511 Rideshare materials, events, etc.	Jumana/ Rachel/ Kit/ Partners										
Identify what data we want to collect internally (511 Rideshare), and externally (from Partners), and create templates.	Jumana/ Helise/ Partners										
Develop strategy on how Apps can promote partnership with 511 on their end.	Jumana/ Rachel										
Understand regional partnerships/activities with partner apps											
Understand other regional efforts/partnerships with App Partners, participate with these efforts where appropriate, and consider them in strategy so work is not duplicated or confusing.	Jumana/ Partners/ Regional Stakeholders										
Identify the gaps											
Identify the gaps in usability and in regions served. This will be important moving forward so that gaps can potentially be addressed by coordinating with specific County/Regional partners or with Partners/RMS during updates. This will be considered on an ongoing basis as Private Partner apps may broaden usability and focus geographies throughout the project and new Private apps may Partner with MTC	Jumana										

Phase 1 – Build Awareness: Between October 2015 and March 2016, we will focus on all low-hanging fruit (website updates, e-blasts, social media, placement calls, etc). We'll also be prepping for the next phase's activities.

		Pre-Partnership		Мо	nth	of Pa	rtne				
Activity/Sub-Activity	Responsible Party	Oct	Nov	Dec	1	2	3	4	5	6	7
Communications											
Draft initial press releases – [This will consider at what point to draft press releases to maximize newsworthiness and promote the greatest number of partners.]	Jumana/ Kit										
Update Website											
Update 511 Rideshare home page on the slider and the icon at bottom	Jumana/ Rachel/ CRG										
Develop new page featuring private partners – add partners as they come on board	Jumana/ Rachel/ CRG										
Update FAQ pages— add partners as they come on board	Jumana/ Rachel/ Brooke										
Ensure website information is updated to reflect technology changes	Jumana/ Jon										
Update RMS											
Update RMS to refer people to Partners as an additional carpool option (whether or not matches are available).	Jumana/ Jon/ Media Beef										-
Update language in RMS site and emails to include Partners	Jumana/ Jon/ Media Beef										→

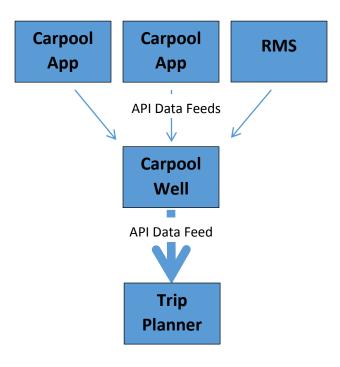
		Pre-Partnership			Мо	Month of Partnership					
Activity/Sub-Activity	Responsible Party	Oct	Nov	Dec	1	2	3	4	5	6	7
Customer Interfaces (non-website)											
Educate 511 Rideshare Staff on Apps											
Develop fact sheet for 511 RS staff – Update as needed throughout project	Jumana										-
Schedule training sessions for 511 RS staff to go through overall Partner strategy, procedures, etc.	Jumana/ 511 Managers										
Schedule App demos at 511 RS	Jumana/ Partners										
Commuter Services - incoming and outgoing (placement) calls											
Edit procedures/checklists, reports, and evaluation metrics to include Partners	Jumana/ Daniel/ Helise										
Identify whether and how specific Apps should be marketed to specific commuters, and if so how that should take place.	Jumana/ Daniel										
Edit CSD scripts and FAQ to include partners											
VanPool Support											
Edit procedures/checklists, reports, and evaluation metrics to include Partners, where possible (primarily to use partner Apps to fill empty vanpool seats on a short term or long term basis).	Jumana/ LaShawn/ Helise										
Employer Outreach											
Edit procedures/checklists, reports, and evaluation metrics to include Partners	Jumana/ Christy/ Helise										-
Edit presentations to include partners - add new partners where applicable as they come on board.	Jumana/ Christy										
Identify whether specific Apps should be marketed to specific employers/employees, and if so how that should take place.	Jumana/ Christy										
Include partners in employer e-blasts where appropriate	Jumana/ Christy										→

		Pre-Partnership		hip	Month of Partnership						
Activity/Sub-Activity	Responsible Party	Oct	Nov	Dec	1	2	3	4	5	6	7
Events and Canvassing											
Edit procedures/checklists, reports, and evaluation metrics to include Partners	Jumana/ Kathryn/ Helise										
Develop/identify materials to provide at events (and for canvassing) - as takeaways to encourage people to sign up - maybe sign up on site (with an ipad)	Jumana/ Rachel/ Kathryn										-
Determine how to include partners in events. Coordinate with partners on which events they are attending; on-site coordination if both 511RS and Partners are attending.	Jumana/ Kathryn										
Delegated County Partners and other stakeholders (such as TMAs,	business improvemen	t districts	, busin	ess parl	ks, et	c.)					
Update County Partners on App Partner strategy and how it will affect 511 Rideshare, including future improvements to RMS.	Jumana										
Provide materials for County Partners and other stakeholders to provide to employers or include on their web pages, where applicable. (such as operational changes and event materials)	Jumana									_	->
Marketing and Incentives											
Email and Social Media Marketing											
Develop bi-monthly e-blast schedule and messaging	Jumana/ Rachel										-
Develop social media plan and messaging, identify if there are other social media platforms that may make sense to use.	Jumana/ Rachel										
Identify ways to include Partners in low-tech gamification (and rewards/incentives that go along with it), or include in messaging on emails.	Rachel/ Jumana										->

		Pre-Partnership			Мо	nth	of Pa	f Partnership								
Activity/Sub-Activity	Responsible Party	Oct	Nov	Dec	1	2	3	4	5	6	7					
Incentives/Promotions																
Trip Diary Prizes (monthly)																
Identify promotional/incentive strategy with each partner, how to use \$15,000 on promotions	Jumana/ Rachel															
Coordinate with Partners on implementing promotions/incentives, where appropriate																
Marketing Campaigns																
Develop plan to include Partners in micro-hood and other existing campaigns, where possible.	Jumana/ Rachel															

Phase 2 – Develop and Implement Technology Improvements: During 2016¹, technological improvements will be developed that will transform 511 Rideshare from a static database to one that meets the varied ridesharing needs of travelers in the Bay Area. All Phase 1 activities will continue.

A "Carpool Well" solution will be investigated. It would be independent of the RMS, so the RMS would be one of the inputs just like the partner Apps. This allows a decision in the future to maintain the RMS in whole or in part, or shut it down, without affecting the overall functioning of Carpool Well. Additionally, we will explore the possibility for Carpool Well to include its own API so other web or app developers can use the data aggregation services in their own Apps, thereby increasing functionality of the aggregation service. We will seek to coordinate with stakeholders that could potentially use Carpool Well data to ensure it is useful. This is shown in the diagram on the right.



				2015		2016					
Activity/Sub-Activity		Responsible Party	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Develop and impleme	Develop and implement technological improvements: Website, App, Carpool Well, Trip Diary and Gamification, RMS.										
1 1	cy sites (SACOG, etc) for capabilities and d coordinate with Nisar Ahmed re: GTFS-	Jumana									
Identify technolog	y needs and priorities	Jumana/ Jon/ Partners									

¹ Note: As of December 2015 Plans for Carpool Well have been delayed while the Rocky Mountain Institute and Tri-Met (and possibly other industry groups) develop a ridesharing data feed standard. Our team will continue to follow any new developments to see if/when Carpool Well development can resume.

		2015				2016							
Activity/Sub-Activity	Responsible Party	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June			
Identify if there are any priority usability improvements that can be rolled out quickly.	Jumana/ Lauren												
Explore App Partners capabilities and upcoming updates for opportunities. (trip diary and RMS)	Jumana												
Draft press release about new functionality (Phase 2)	Jumana/ Kit							П					
Include new technology improvements in promotional materials and marketing (Phase 2)	Jumana/ Kit/ Rachel												
Carpool Well (Web and App) ²													
Develop requirements/functionality; Coordinate with Partners, develop priorities, data needs, evaluation metrics, login requirements, etc.	Jumana/ Jon/ Helise												
Explore potential partnerships with popular trip planners such as GoogleMaps/ Waze re: incorporating Carpool Well API (Begin developing partnership early on in order to ensure that functionality meets their requirements)	Jumana/ Barbara												
Develop pros and cons; Decide on platform option (use ToEverywhere.net, existing prototype, develop new platform)	Jumana/ Barbara												
Develop sketch layout	Jumana/ Jon												
Send out to CRG for design													
Get cost estimates													
Implement													
Test													
Release													

 $^{^{\}rm 2}$ See footnote above regarding schedule delay on Carpool Well development

			2015			2	2016			
Activity/Sub-Activity	Responsible Party	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Frip Diary (Web and App)										
Research gamification options (Awards for meeting specific goals - including small achievements (ie. Sign up for RMS); competition with friends; competition within company (ie. different department or office); competition between companies.)	Jumana/ Jon									
Develop requirements/functionality; Coordinate with Partners, develop priorities, data needs, evaluation metrics, login requirements, etc.	Jumana/ Jon/ Helise									
 Develop pros and cons; Decide on platform option Use existing trip diary Media Beef separates it from RMS and re-designs Use existing system developed by others (such as another government agency or private sector developer Develop new platform 	Jumana/ Barbara									
Develop sketch layout	Jumana/ Jon									
Send out to CRG for design										
Get cost estimates										
Implement										
Test										
Release										

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Phase 3 – Make Decision Regarding Full Transition Strategy and Implement: Once Carpool Well is operational and the PPAs have been actively promoted, activity will be monitored to identify whether one or more of the apps is gaining enough traction to justify turning the RMS off, or maintaining limited operation of it.



Carpool Well³ and the new trip diary are planned for release in 2016.

Trip Diary: Once the new trip diary is released, new registrants will not be able to enter the old trip diary, but be forwarded to the new one. Current users will be transferred over, with their data to the new diary. Once this process is complete, the old trip diary will no longer be available for use and will be turned off.

Carpool Well: Carpool Well will be investigated as a way to provide aggregated carpool matches from App Partners as well as from 511 Rideshare's RMS. It would operate independently of the RMS, allowing it to function regardless of the decision to maintain or shut down the RMS.

RMS: Once Carpool Well has been operating and promoted for several months, the team will decide whether or not to maintain the RMS as one of the inputs to Carpool Well. Regardless of whether the RMS is maintained in whole or in part, or is shut down, Carpool Well will likely continue operation.

³ See footnote above regarding delayed schedule for Carpool Well development.

FACTORS TO CONSIDER BEFORE RELYING SOLELY ON PRIVATE-SECTOR CARPOOL MATCHING APPS

The following considerations will be incorporated into the decision-making criteria:

- Does one or more of the private partners show a long-term commitment to stay in the carpool matching marketplace?
- Has one or more of the private partners gained a "critical mass" in terms of app downloads, registrations, and actual carpool trips taken to provide a viable ridesharing option for the Bay Area?
 - The collective total of carpool matching app downloads over a one year period is XX,000.
 - The collective total of carpool trips taken via carpool matching app reaches 100,000 to 150,000⁴ for at least three consecutive months
- Will there be significant gaps in service, geographically or functionally, if the RMS is turned off?
 - Private sector apps are used by commuters in all nine Bay Area counties (the same app does not ubiquitous use throughout the Bay Area).
 - o % of rideshare customers without smart phones
- Is the RMS technology still relevant in the marketplace?
 - o RMS new registration numbers are have not decreased significantly despite the availability of private partner apps.
- Does MTC have the funding/interest in continuing to operate the RMS?

If continuing to operate RMS:

- Identify how RMS fits into overall ride match marketplace and whether it should be maintained as a whole or only portions of its functionality.
- Re-evaluate partnerships strategy and if and how it still makes sense.
- Develop implementation plan for how RMS and Carpool Well are maintained and marketed.

If shutting down the RMS:

Turn off RMS matches, so any customers searching in the RMS find only private partner matches

⁴ Similar to average monthly vehicle trip reduced due to current rideshare program ridematching activities.